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Education**

> **Note:** *Any work not explicitly included in the Project Scope document is implicitly excluded from the project product.*

Program & Project Name:	MCESA REIL: Data Verification Tool
Project Manager(s):	**Niranjan Dravid (ADE), Al Dullum (MCESA)**

Version History

Version	Date	Comments
0.1	12/10/2012	Initial draft prepared by Rich Schnettler after reviewing other relevant BRDs and documents including TDV BRD Baseline v1.0, DSRS BRD 12-6, BRD Data Management (DMAR), and others.
0.2	12/14/2012	Reviewed with Christa and incorporated changes as discussed.
1.0 Draft	12/17/2012	Finalized DRAFT version with Christa's feedback and ready for distribution to MCESA. Added Critical Success Factors subsection.
1.0 Baseline	12/27/2012	Received email from Laurie King indicating no changes required. Also provided product presentation from BFK. Created BASELINE version from DRAFT.
1.0 Baseline	01/02/2013	Amended per Jolene Newton request to include the number of expected users: The number of LEAs, the number of schools per LEA, and the number of education professionals by user type. Made changes to schedule.
1.0 Baseline	01/16/2013	Amended to include coach, update with the name of the new ADE project manager for this project and a few minor corrections.

1. Executive Summary

The Maricopa County Education Service Agency (MCESA) has undertaken a five-year initiative aimed at improving student learning and achievement by increasing the effectiveness of teachers and principals. Several alliance school districts in Maricopa County are engaged in the Rewarding Excellence in Instruction and Leadership (REIL) initiative, which is funded by a Teacher Incentive Fund grant from the U.S. Department of Education.

The purpose of the DVT project is to deliver a "data verification capability" for several different data areas including teachers assigned to each school; career pathway designation; demographics; and for each course/section the teachers assigned and for each student in the roster, the amount of instructional time and teaching teams, as well as the REIL score. The DVT must meet 2012-2013 end of school year teacher data and student roster validation requirements and 2013-2014 beginning of school year payout requirements in order to provide educators visibility into certain components of their overall evaluation process.

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1. Executive Summary

The scope of this effort is to deliver key new capabilities to each REIL Alliance school district by May 15th of 2013 as required by the REIL grant agreement. Thus, there is a critical business need to ensure that there is a method and capability to review data and ensure that it is accurate as it relates to the REIL Score.

The challenge with data verification capability, which includes tracking and monitoring the resolution of inquiry submissions arising from data verification discrepancies, is that it is not typically delivered from a data warehouse environment as MCESA is requesting in the DSRS project. A data warehouse typically only exposes data collected in a central repository from various education systems across the entire ADE organization for reporting using business intelligence tools. "Data verification" should actually occur, where possible, in each system where the data is owned and mastered (i.e., "its single source of truth") before it feeds into a data warehouse.

Verification requires a response for each data point of either it is 100% correct (i.e., "submit an approval of acceptance") or when there is a potential discrepancy or question (i.e., "submit an inquiry") for demographics, student- roster data, REIL score, etc. Data is collected from numerous system sources, combined, and then used to calculate what is known as the REIL Score. Since a third party vendor, Basis Research, performs the REIL score calculation in the 2012-14 school years, it is not available for review and verification until the data feed is actually provided to the ADE, which is scheduled around mid-summer of 2013. The solution needs to manage and track, and report on all data approvals and inquiry submissions until they have been resolved.

Ideally, each Education Professional should have the ability to periodically review and update their demographic data or an alternatively provide someone with access to do this on their behalf.

If the Student-Teacher-Course Connection (STCC) is confirmed to effectively manage the linkage for each teacher, the grades, courses and sections in the schools in which they teach along with their student rosters, then the only missing gap is the amount or percentage of instructional time. Another potential gap that needs to be verified is the capability to manage group/team memberships with respect to assessment tests. At a minimum, a snapshot of the STCC data should be provided at the end of the school year and the teacher should be able to validate the accuracy of the information. It could be very beneficial over the long term to also collect data on the 40th Day and the 100th Day or even more frequent increments.

Note: For any instance where there is a discrepancy between the ***Project Charter*** and the ***Project Scope Statement***, the latter is considered authoritative.

2. Business Objectives

2.1 Project Description (Note- for | *By working in collaboration, ADE and MCESA will design,*

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2. Business Objectives

clarity, the term "product" describes the solution or tool for this particular scope statement)**:**	*develop and deploy a product or alternatively evaluate, select, and implement a vendor product, should one exist, that satisfies the business needs and capabilities around a "data verification tool" as defined in the requirements document.*
	The data verification tool will provide the capability for the various Users to either confirm the accuracy of their data or submit an inquiry to a superior, if there is a potential discrepancy. The tool should manage and track each inquiry submission until it has been resolved. The tool should also provide reports on both open and closed inquiry submissions in order to monitor resolutions and their progress towards closure not only on an individual basis, school, and school district level.
2.2 Business Objectives:	*Goal 1: Provide on-line, real-time, 24 x 7 x 365 access to data verification features, functions, and reports.*
	Goal 2: Provide the capability to support a workflow process of inquiries from submission through resolution that potentially includes routing through a Teacher or Coach, Building Administrator, Superintendent, and HR Administrator.
	Goal 3: Gather or ensure that all data is being gathered from its appropriate source so the data may be reviewed and verified for accuracy.
	Goal 4: Provide the capability to verify the accuracy and completeness of the data: teachers assigned to each school; career pathway designation; demographics; and for each course/section the teachers assigned and for each student in the roster, the amount of instructional time and teaching teams, if applicable; as well as the REIL score. Items requiring data verification may need to be entered or selected in DVT for: instructional time, and team teacher for each student in the roster, teaching team assignment, teachers' assigned to a principal, and teachers' assigned to a coach.
	Goal 5: Provide the capability to review each data point and either electronically approve that the data is accepted as one-hundred percent (100%) correct or submit an inquiry for any perceived discrepancy. The capability should extend to manage, track, and report on all data review, approvals, inquiries and resolved inquiries.
	Goal 6: Provide access to data verification (e.g., demographics) and data verification progress statistics, data discrepancy issue submission and resolution tracking information, etc. Note: Access to new reports may

2. Business Objectives

	alternatively be provided via DSRS.

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3. Project Description

The Project Product Scope below defines and clarifies the following scope of work for this project:

3.1 Project Product Scope

Includes:	*3.1.1 REIL Alliance School districts (See Appendix A).*
	3.1.2 User account permissioned access to data verification and reporting capability for Teachers including SPED Teachers, Coaches, and Building Administrators at the schools as well as Superintendents and HR Administrators at the LEAs.
	3.1.3 For each Teacher, Coaches, and their Building Administrator, Superintendent, and HR Administrator, visibility as appropriate for their position in the organizational hierarchy to their:

- *Teacher roster,*
- *Career pathway designation,*
- *Teachers assigned to a coach,*
- *Demographics including teaching team,*
- *Course/sections assigned to each teacher, and for each course/section: teachers assigned, and for each student in the roster, the amount of instructional time and teaching teams, and the*
- *REIL Score.*

	3.1.4 Data management feed from STCC unless provided by DSRS.
	3.1.5 Workflow process and routing of approvals and submissions.
	3.1.6 A solution architecture that involves consuming all requirements and providing work-in-progress artifacts (e.g., implementation document) to direct product evolution using a phased approach.
3.2 Does Not Include:	*3.2.1 Non-REIL Alliance school districts.*
	3.2.2 Data management feeds from the various systems including BASIS Research except where noted in item 3.1.4 above[1].
	3.2.3 Extracts to and from BASIS Research delivered in flat file (.txt, .csv) formats[1].
	3.2.4 REIL Score change history report and other reports from DSRS[1].
3.3 External Dependencies:	*3.3.1 BASIS Research consolidation of data verified, approved, and provided by ADE. REIL Score calculation, data extract and file handoff back to ADE.*

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[1] See DSRS Project Scope Statement document.

3. Project Description

3.4 Critical Success Factors:	*For the project to be successful, the product solution must, at a minimum, deliver on the following:*
	3.4.1 On-line, real-time, 24 x 7 x 365 access to data verification capabilities for all REIL Alliance School districts.
	3.4.2 Workflow processes that drive and support the routing of data inquiry submissions to one or more levels in the organization until it is resolved or closed.
	3.4.3 User account permissioned access to a single sign-on for Teachers, Coaches, and Building Administrators at the schools as well as Superintendents and HR Administrators at the LEAs.
	3.4.4 Access to all collected data points requiring verification including demographics, student-roster, group/team memberships, and REIL score, as well as the value-add component that is appropriate for the logged-in User.
	3.4.5 Manage, track, and provide visibility to all data verification approvals and discrepancies as well as resolutions for all Education Professionals that is appropriate for the logged-in User.

3.4 Assumptions / Constraints:	*3.4.1 By limiting who has access to types of information by using identity management, the product will comply with the Family Educational Rights and Privacy Act (FERPA). User account management for the data verification tool will be limited to Teachers, Coaches, and Building Administrators at the schools as well as Superintendents and HR Administrators at the LEA.*
	3.4.2 Single sign-on capabilities will be included only if the IMS project is completed in January of 2013 and only if agreed to by the appropriate parties.
	3.4.3 Hardware and infrastructure for this project will be allocated to collect data and support the new capability needed by this project if they are already available otherwise work activities and cost estimates will be required if not.
	3.4.4 To standardize on the same platform, the product should be built to work on the most current supported versions of MS Internet Explorer and Safari browsers.
	3.4.5 Battelle for Kids, a vendor with a suite of products, may be re-evaluated along with other vendor products, if there are any as a potential solution alternative to custom design and development.
	3.4.6 ADE IT resource(s) will be engaged to create the user interface, ETL processes, as applicable, and any infrastructure needs (i.e., development, DBMS, testing, training and online help documentation) to maintain and support the data verification capability unless a vendor product is selected instead in which case resource needs would be scaled back appropriately.
	3.4.7 Data that is stored or used by the data verification tool should be CEDS compliant.
	3.4.8 Data from the 2012-2013 school years will be used for the initial release of this project.
	3.4.9 REIL Score component breakdown calculation for teachers for school year • *2012-13:* - *75%: Observation* - *25%: School Growth* • *2013-14:* - *50%: Observation* - *40%: Individual Growth* - *5%: Team Growth* - *5%: School Growth*
	3.4.10 Any observation and evaluation completed for an Educational Professional should be reviewed and manually signed off (i.e., "paper and pencil") or through electronic acknowledgement (i.e., "TNL") by the evaluatee and their evaluator <u>before</u> it is consumed in the REIL score calculation.
	3.4.11 Completed student assessment test scores should also be assigned <u>before</u> this component is consumed in the REIL score calculation.
	3.4.12 The product solution should support the estimated User volumes as shown in Appendix A.

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3.5 Risks:	*3.5.1* **ADE Integration and infrastructure.** *If the hardware, infrastructure and integration pathway is not in place, then it will need to be built.* *3.5.2* **TNL Integration.** *If the new vendor product is not implemented in time then there will be no observation data feed to this product.* *3.5.3* **IMS not implemented.** *If IMS is not implemented then additional capabilities will need to be designed and delivered to support this product's requirements.* *3.5.4* **This is the first project of this magnitude to be delivered by ADE IT.** *ADE IT will need to continue to improve in its efforts to use "best practices" standards and processes to ensure an on-time, in budget, high quality delivery of this project.* *3.5.5* **New data feed (e.g. Galileo).** *If a new data feed is required from Galileo (LEA-facing system), then a service will need to be built otherwise there will not be any data available.* *3.5.6* **Data governance**. *If the new set of data governance deliverables are not approved by data governance then this product cannot be built and delivered.* *3.5.7* **REIL model and Basis value added measure has not yet been validated**. *If the REIL model and Basis value added measure are not validated then it will not be possible to calculate the REIL score.*

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4. Project Milestones

4.1 Estimated Schedule

Task / Activity	Target Due Date
DISCOVERY	
• Project Start	12/10/2012
• Product Schedule drafted	01/11/2013
• Product Schedule Finalized / Approval / Sign-off[3]	01/14/2013
• Scope Statement Approval/Sign-off[3]	01/22/2013
• Product BRD drafted	01/22/2013
• Product BRD Finalized / Approval / Sign-off[3]	01/25/2013
• Vendor Product Analysis	01/22/2013
• Product BRD Release to Development	01/22/2013
• Vendor/Product Demos	01/30/2013
• Make/Buy Decision[3]	01/30/2013
DESIGN	
• Product Design	02/15/2013
• Product Design Review Gate with Customer[3]	02/15/2013
DEVELOP	
• Product Build	04/12/2013
• Product Build Review Gate with Customer[3]	04/12/2013
• Product QA	04/26/2013
• Product QA Review Gate with Customer[3]	04/26/2013
• Product UAT	05/10/2013
DEPLOY	
• Product Deploy - Go / No Go[3]	05/14/2013
DEBRIEF	
• Closure[3]	06/14/2013
• Lessons Learned	06/14/2013

Notes:

1. The preliminary estimate is ± 40% due to the fact that the project is very early in the discovery phase.
2. If it is determined that the product solution will be:

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a. Purchased, then the estimated schedule will need to be reviewed and revised
b. Custom built, then it may be necessary to iterate through multiple design-build-test cycles.
3. Denotes project milestone.

5. Project Approach (overall project approach)

Describe Primary Plans briefly in the space below.

The project artifacts will be documented by the ADE PM and BA respectively and archived on the project site(s) noted below. Remote team members who do not have access to the ADE SharePoint site will receive extracts of this data twice a week.

ADE SharePoint Site: MCESA REIL SharePoint Link

PM Site: www.projectmanager.com

How will project issues be dealt with? Issues will be tracked using the logs on the project site(s) noted below. Escalations will be managed through the ADE Program Manager and any actions will be coordinated with ADE PM and MCESA PM on viable solutions of the root cause of the issue. Remote team members who do not have access to the ADE SharePoint site will receive extracts of this data twice a week.

ADE SharePoint Site: SharePoint Log for MCESA Actions, Issues & Risks

TFS Site:

http://tfs.intranet.azed.gov/ADE-Projects/MCESA-AnalyticsIntegration/Dashboards/Progress.aspx

How will Change Requests be dealt with? Change requests to the product scope or enhancements will be submitted to the ADE Program Manager and reviewed with ADE Development Director and MCESA Project Sponsor for development impact as it pertains to cost, time and scope. If the change request can be reviewed and approved for incorporation before the freeze point / close-out of development process for design and build of the product, a BRD update approved by ADE and MCESA will record the change to scope. Changes to cost and time will be tracked in the Project Plan and Weekly Status Reports including the Budget worksheet.

List any scheduled project team meetings, planned status reports: Weekly Product Status reports will be generated and delivered to ADE IT directors, CIO and ADE program manager. Project team meetings are scheduled daily for progress updates and impediment identification.   Monthly Progress reports (compiled jointly by ADE and MCESA Project Managers) will be generated for the REIL program overall and delivered to ADE IT Program Managers, Directors, and CIO and MCESA directors and executives. MCESA and ADE weekly 1:1 meetings will be used to share progress from both teams, review and approve artifacts and collaborate on various topics. A Steering Committee consisting of members from both MCESA and ADE executive leadership will be used to obtain sponsor approval of phase gate completion, product deliverables, budgetary items and partnership decisions.

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6. Authorizations

The Project Scope Statement, Project Schedule, Resource Plan and Project Budget are approved by the:

• **Program Sponsor(s)**	Kristine Morris (MCESA), Jolene Newton (ADE), Linda Jewell(ADE)
• **Program Manager**	Christa Thompson
• **Executive Director**	Pamela Smith (ADE Budget only)
• **ADE Project Manager**	Niranjan Dravid

Project performance baseline changes will be approved by the:

• **Program Sponsor(s)**	Kristine Morris (MCESA), Mark Masterson (ADE)
• **Program Manager**	Christa Thompson
• **ADE Project Manager**	Niranjan Dravid

Project deliverables will be approved/accepted by the:

• **Program Sponsor(s)**	Kristine Morris (MCESA), Jolene Newton (ADE), Linda Jewell(ADE)
• **ADE Program Manager**	Laurie King (MCESA), Christa Thompson (ADE), Linda Jewell (ADE)
• **REIL Program Director**	Lori Renfro (MCESA)
• **REIL SME**	Laurie King (MCESA)
• **MCESA Program Manager**	Al Dullum
• **ADE Project Manager**	Niranjan Dravid
• **Key Stakeholders**	REIL Districts, MCESA, BASIS Research, ADE

7. Project Scope Statement Approval / Signatures

Program: Project Name:	MCESA REIL: Data Verification Tool
Project Manager(s):	Al Dullum (MCESA), Niranjan Dravid (ADE)

The purpose of this document is to provide a vehicle for documenting the initial planning efforts for the project. It is used to reach a satisfactory level of mutual agreement between the Project Manager(s) and the Project Sponsor(s) and Owner(s) with respect to the objectives and scope of the project before significant resources are committed and expenses incurred.

I have reviewed the information contained in this Project Scope Statement and agree:

Name	Role	Signature	Date (MM/DD/YYYY)
Kristine Morris	MCESA Assoc. Chief Deputy Superintendent		
Al Dullum	MCESA Program Manager		
Christa Thompson	ADE Program Manager		
Jolene Newton	ADE Program Director		
Linda Jewell	ADE IT Director of Development		
Niranjan Dravid	ADE Project Manager		

The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Project Scope Statement *document.*

1. APPENDIX A – Estimated User Volumes

	District Name	Type	# of Schools	# of School Leaders	# of Teachers	# of Coaches
	Alhambra	REIL	15	30	794	Unknown
	Gila Bend	REIL	2	5	27	3
	Isaac	REIL	12	31	494	14
	Nadaburg	REIL	2	4	52	4
	Tolleson	REIL	4	12	154	10
	Arizona Department Of Juvenile Corrections	REIL TNG	2	2	36	5
	Balz Elementary School District	REIL TNG	5	5	167	10
	Maricopa County Regional School District	REIL TNG	4	8	33	5
	Mobile Elementary School District	REIL TNG	1	1	5	1
	Phoenix Elementary School District	REIL TNG	14	14	450	30
	Roosevelt Elementary School District	REIL TNG	19	30	530	50
	Wilson Elementary School District	REIL TNG	2	4	76	5
	Learning Matters	REIL Extend	21	34	606	Unknown
	Laveen	REIL Extend	6	6	218	Unknown
Totals	**14 Districts**		**109**	**186**	**3642**	**~ 200 (est.)**